

AESOP User Guide for Campus Users

FAUQUIER COUNTY PUBLIC SCHOOLS
HUMAN RESOURCES

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Introduction

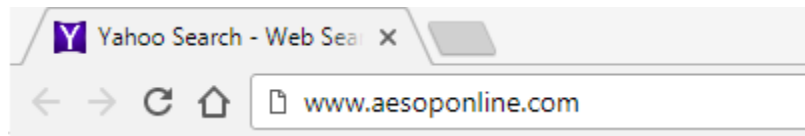
This Campus User Guide will cover most of the features of the AESOP website. Be aware that since AESOP is a permission based system you may see some features here that you do not have permission to view or access.

Depending upon your position at your school, you may have both an employee login and a campus user login. This should be set up so that you have the ability to toggle back and forth from the two different logins without having to have two completely different usernames and passwords. If you do not have that option, please contact the Human Resources Department at 540-422-8300 for assistance.

All of the information contained in this document can only be view while logged into your Campus User profile. Be sure that you are in the correct profile prior to attempting any of these procedures.

Logging In

The first step to log on to AESOP is to visit the website. Type www.aesoponline.com into your internet browser's address bar and hit the *Enter* button on your keyboard.



This will take you to the AESOP website, enter your Username and PIN on the following screen and click *Sign In*.

A 'Sign In' form with a title 'Sign In' at the top. Below the title are two input fields: 'ID or Username' and 'PIN or Password'. At the bottom of the form is a blue button labeled 'Sign In'.

Forgot Your Username or Password?

If you have forgotten your Username and/or Password you can click on either of the links, *Forgot my Username* or *Forgot my Password*. This will take you to a page where you can enter your email address and have a reminder sent to you.

Two side-by-side forms for recovering account information. The left form is for 'Forgot my Username' and the right is for 'Forgot my Password'. Both forms have a text input field and a blue button. Below each button is a link to 'Return to Sign In'.

Home Page

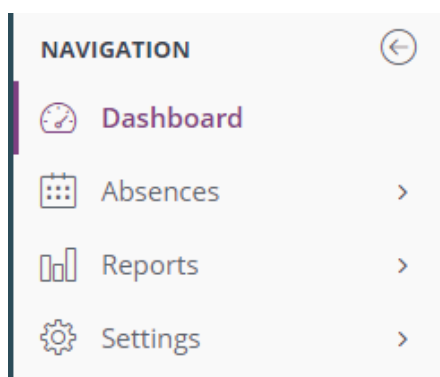
For those campus users that are also employees that are submitting absences and/or time through AESOP, you will need to make sure that you are viewing your home page under the correct account. To verify, look under your name in the upper right hand corner once you are logged into AESOP.

You should see the word *Campus User* under your name. If you do not, click on your name and select the campus user account from the drop down.



Navigation

Under Absence Management on the left side of your screen, you will see that Navigation section. From here you will be able to navigate to the follow areas:



Dashboard – this will take you back to your main page from any screen within AESOP

Absences – from this tab you can view and create absences


Reports – this section will take you to available reporting options

Settings – this section will take you to your personal setting as well as the school settings

Quick Actions

On the right side of your dashboard you will have the options to search for an absence confirmation number, create and/or approve absences as well as create a vacancy.

Quick Actions



Create Absence

Approve

11

in the next 45 days

Create Vacancy

Reconcile

9

in the past 30 days

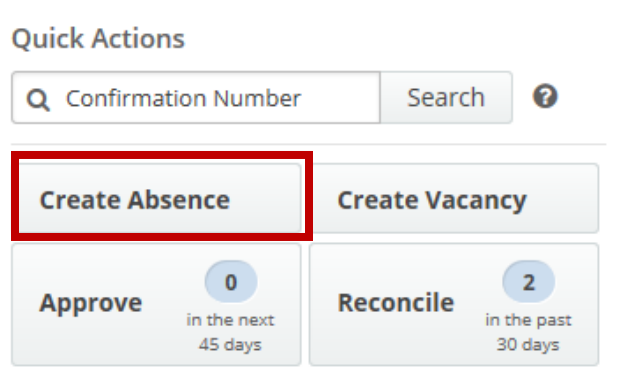
Absences and Vacancies

Creating an Absence

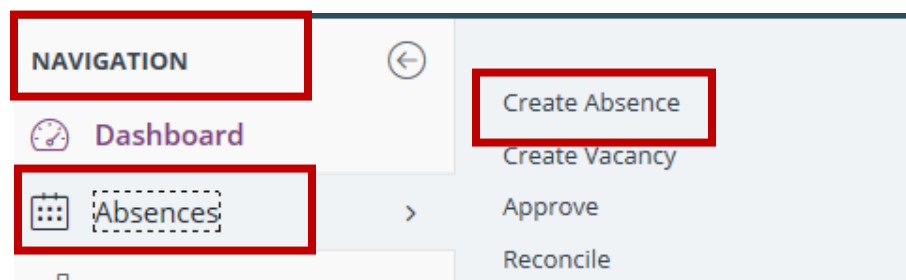
In most cases your employees will be creating their own absences in AESOP but there may be an occasion where you as the campus user will have to create an absence for an employee.

There are two places on the home page that you can begin when trying to create an absence for an employee.

1. You can click on *Create Absence* under the Quick Actions section on the right hand side of the screen.



2. Under the *Navigation* section, click on *Absences* then *Create Absence*.



By using either of these options, you will be taken to a page where you can search for the employee you want to create an absence for. Simply begin typing the last name in the search bar and the right side of your screen. Once the employee's name appears, click the circle next to their name and then click the *Fill out Details* button.

Absence: Create Absence

Select Employee Fill out Details Review & Confirm Done

Step 1: Select Employee

Next Step: ✓ Fill out Details

Search: Last Name

Search by Letter	Name	Phone	School
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On the following screen you will need to complete:

- The date of the absence
- Absence Reason
- Time
- Substitute Required
- Substitute Report Time (if different than the employee absence time)

Once those sections are complete, click the *Review & Confirm* button

Select the day(s) you will be out:

From To

Select Start Select End

October 2017

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

+ Add New Variation

Notes & Attachments

Previous Step: Select Employee

Next Step: ✓ Review & Confirm

Absence Reason Select One

Time Please enter a valid time range using the HH:MM AM format.

Full Day 08:00 AM to 03:59 PM

Substitute Report Time Please enter a valid time range using the HH:MM AM format.

Full Day 08:00 AM to 03:59 PM

Accounting Code S CI Inst ES Reg Sal Subs

Substitute Required Yes

No Dates Selected

Walter Elementary School

8:00 AM - 3:59 PM

No Reason Selected

You will then be shown the summary of the absence, if any details are left off or incorrect, click the *Fill out Details* button to go back to the previous screen. If all the information is correct, click *Create Absence and Assign Sub* (only if substitute is needed and already contacted) or *Create Absence* (if substitute is not needed or if one has not been chosen).

Previous Step: Fill out Details

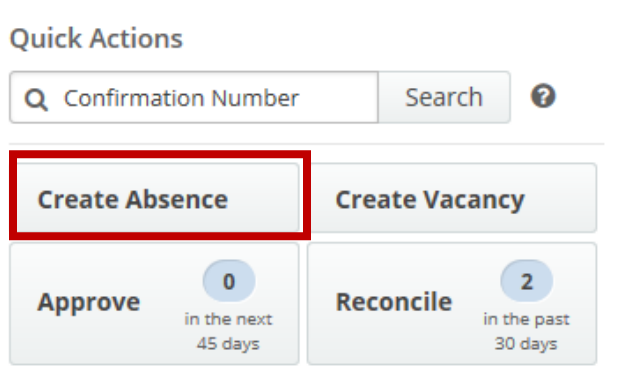
Next Step: ✓ Create Absence and Assign Sub ✓ Create Absence

Creating an Vacancy

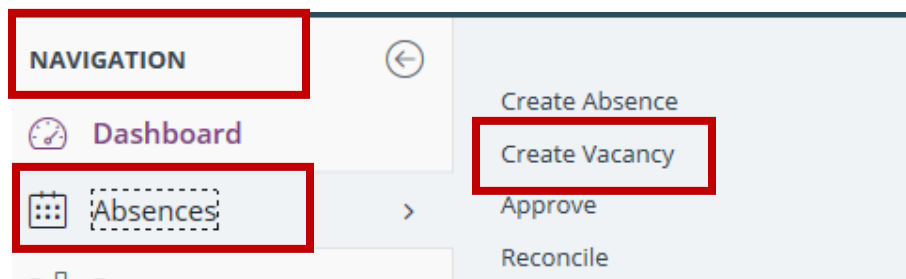
There may be a time that you are creating an absence for a vacant position. In this case, you do not have an employee to attach the absence to, so you will need to create a vacancy instead. In most cases, as the campus user, you will be responsible for creating the vacancy and acquiring a substitute for the day.

There are two places on the home page that you can begin when trying to create a vacancy.

3. You can click on *Create Vacancy* under the Quick Actions section on the right hand side of the screen.



4. Under the *Navigation* section, click on *Absences* then *Create Vacancy*.



By using either of these options, you will be taken to a page where you can search for position you want to create the vacancy for. Simply begin typing the word 'vacancy' in the search bar and the right side of your screen. You will then see a list of the generic positions that you are creating the vacancy for, click the circle next to the applicable position then click the *Fill out Details* button.

Vacancy: Create Vacancy

Select Profile Fill out Details Review & Confirm Done

Step 1: Select Profile Next Step: ✓ Fill out Details

Search:

Search by Letter Name

On the following screen you will need to complete:

- The date of the absence
- Absence Reason
- Time

Once those sections are complete, click the *Review & Confirm* button

Step 2: Fill out Vacancy Details for Vacant Teacher- Elementary Next Step: ✓ Review & Confirm

Please select at least one date at Pierce Elementary School

Select the day(s) you will be out:

From To

Select Start Select End

< November 2017 >

SU MO TU WE TH FR SA

Vacancy Reason None Available

Time Full Day

Please enter a valid time range using the HH:MM AM format.

08:00 AM to 03:59 PM

Substitute Required Yes

Number of Vacancies 1

You will then be shown the summary of the absence, if any details are left off or incorrect, click the *Fill out Details* button to go back to the previous screen. If all the information is correct, click *Create Absence and Assign Sub* (only if substitute is needed and already contacted) or *Create Absence* (if substitute is not needed or if one has not been chosen).

Previous Step: < Fill out Details

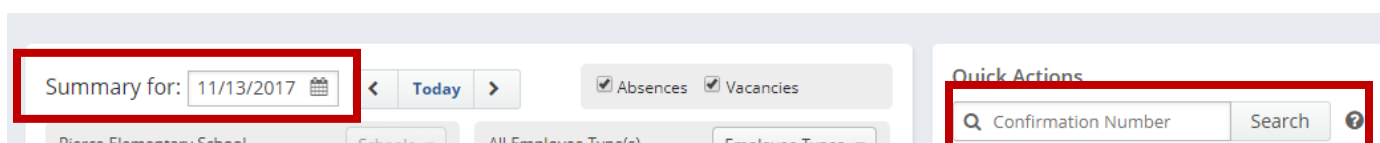
Next Step: ✓ Create Absence and Assign Sub ✓ Create Absence

Modify an Absence or Vacancy

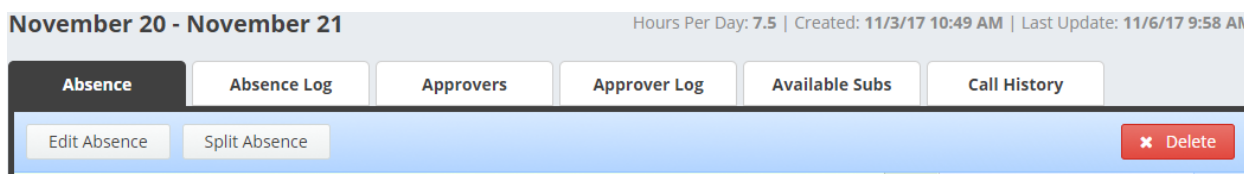
Once an absence or vacancy is created you may, depending on your permissions, have the ability to edit details of the absence or even delete the absence completely.

To modify an existing absence, you can either:

- Enter the confirmation number in the *Quick Actions* section of your dashboard
- Search by the date of the absence by entering the date in the upper left side of your dashboard.



Once you have located the employee absence or vacancy, you will be able to click on the confirmation number to edit any necessary information.



On the modify page, you will see a few options. From this screen you can:

- Edit the absence – you can change the dates, time or assigned substitute
- Split the absence – if this is a multiple day absence/vacancy, you can split it into multiple absences to allow different substitutes to take individual days of the absence or vacancy
- Delete the absence – if the employee is no longer taking the day off, you can delete the absence completely
- Reassign a substitute – if a substitute has already been assigned but is no longer available, you can reassign a new substitute if needed

Absence Log

You can view all activity for a particular absence by clicking on the *Absence Log* tab. You can research who created the absence, who modified it and when. Everything that has happened in regards to that absence will be available here.

Approver Log

You can view the workflow of the absence by clicking the *Approver Log* tab. This will show you who and when the absence was approved.

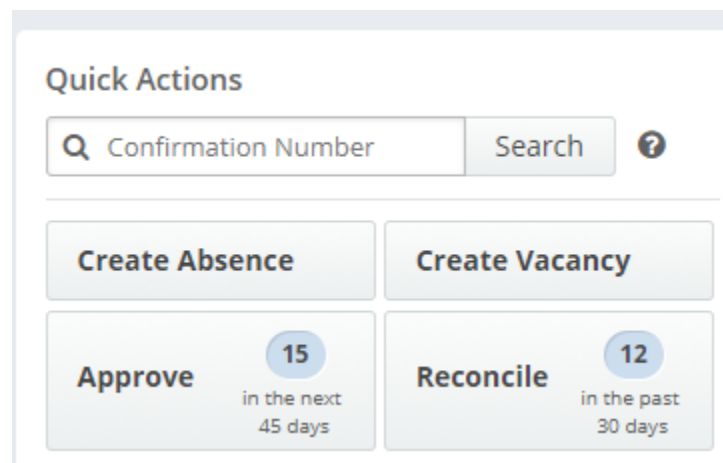
Absence Approval

As a Campus User, it may be your responsibility to approve employee absences for your school. This can be done while logged into your AESOP account. Please be sure that you are logged in as the campus user into to ensure that your permissions are correct.

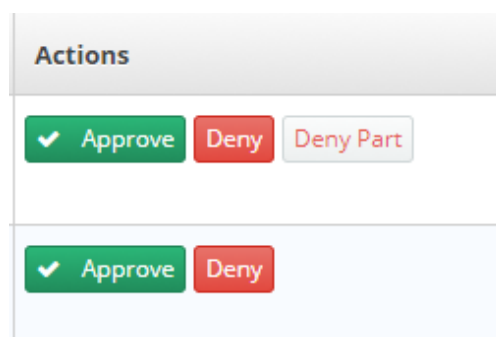
When an absence is created by an employee that you are responsible for approving, AESOP will automatically send you an email when the absence is submitted.

You can click the first link in the email to be taken to your AESOP site to approve the absence. Once you log in you will see the absence with *Approve* and *Deny* buttons. Click on the appropriate button to approve or deny the employee's absence.


If you are already logged into your AESOP account, you can also click on the *Approve* button under the Quick Actions section on the right hand side of your dashboard.

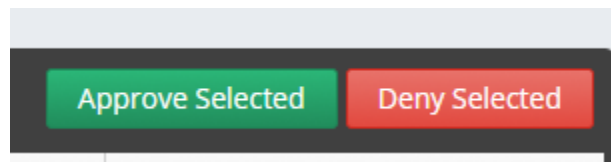


From this screen you will see all of the absences that are pending approval. You can approve or deny all of the absences by clicking the appropriate button.



Your second option would be to select the box next to the absences that you would like to approve and then click *Approve Selected* in the upper right hand corner.

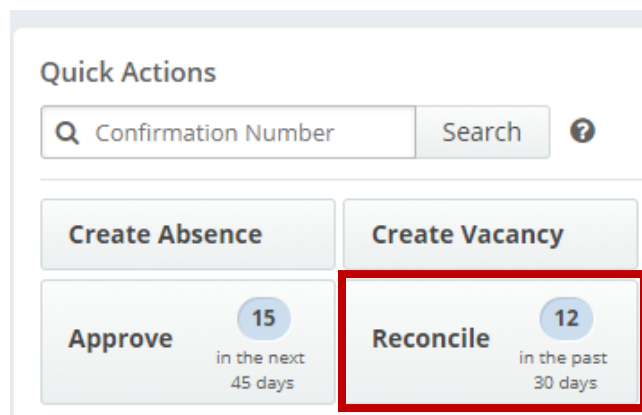
15	Absence
<input type="checkbox"/>	Conf. # ↕
<input checked="" type="checkbox"/>	278131026
<input checked="" type="checkbox"/>	278843127 
<input checked="" type="checkbox"/>	279109285
<input checked="" type="checkbox"/>	278908400



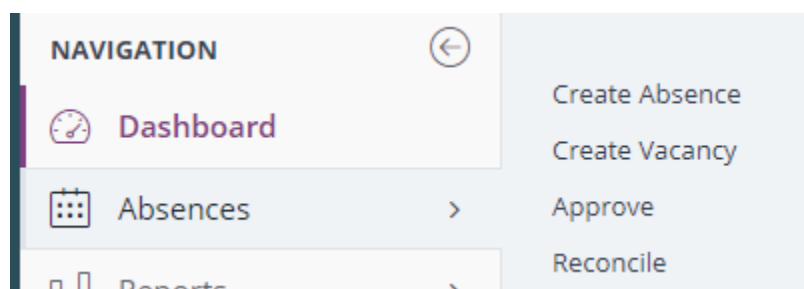
Reconcile Absences

Absences are reconciled or checked for accuracy before the information is put into the payroll system. As the Campus User, you are responsible for reconciling the absences for your school to ensure that the employee leave is correct and the correct substitute has been assigned to certify accurate pay.

On the right hand side of your dashboard, you will see *Reconcile* under the Quick Actions section. Click on this button to begin the process.



You can also select *Reconcile* under Absences in the Navigation section.



Once you have selected the option from either of these areas, you will see the list of all the absences to be reconciled. You can also enter a specific date range at the top of the screen if you are working on a specific time period.

Reconciliation Summary

Date Range: 11/12/2017 11/13/2017
Filled ☒ Unfilled ☒ Sub Not Needed
Pierce Elementary School Schools
Search

How to Reconcile/Unreconcile events:
Access the Details screen for each day by clicking on the number of the events on each day that are reconciled or not reconciled. On the details screen, you can reconcile, unreconcile and modify the details of each event individually or all at the same time.

Date	Reconciled Summary		Not reconciled
November 12 - November 13, 2017		0/11	11
Sunday, November 12, 2017		0/0	0
Monday, November 13, 2017		0/11	Reconcile 11

Under the column *Not reconciled*, you will see a button that has a number of absences that need to be reviewed. Click this button to be taken to the next screen.

From this screen you can click edit to make and necessary changes by clicking the *Edit* button. This is the same process as described under the **Modify an Absence or Vacancy** section above.

From that screen you can click the confirmation number hyperlink and it will take you back to the screen that looks like when the absence was originally created. You can edit from this screen as well.

11 Items
Reconcile All

Absence SHAFFER, CHRISTINA Full Day (8:00 AM-3:59 PM)
Edit Details
Reconcile

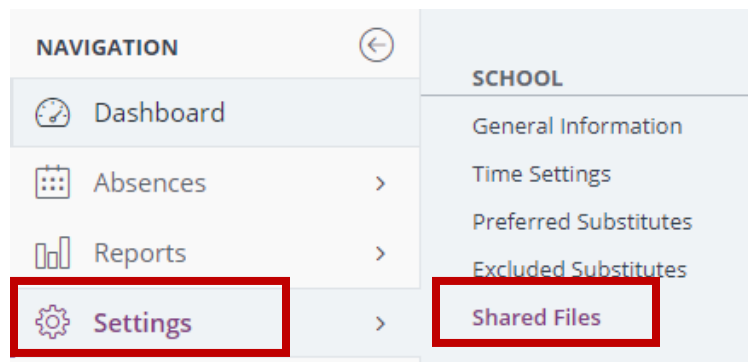
If the information is correct, then you can simply click *Reconcile*. If you have realized that you have reconciled the absence in error, you will still be given the option to reverse the process and then edit prior to reconciling the absence again.

Dismiss
Unreconcile

Absence/Vacancy Files

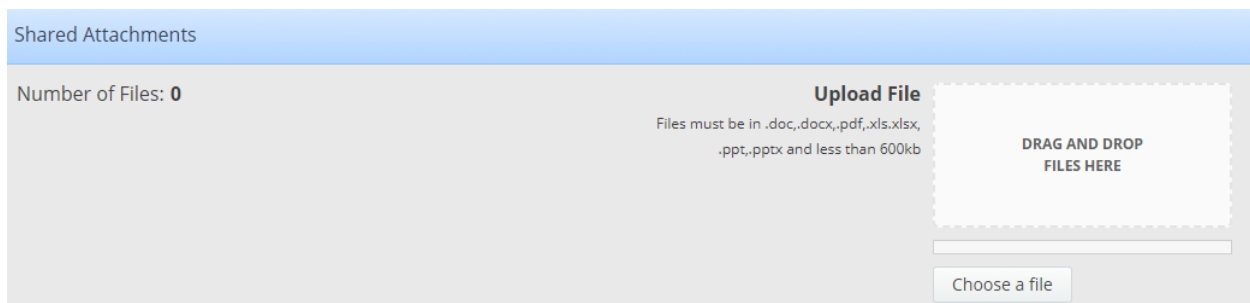
You have the ability to upload files that will be attached to every absence at your school for a time period that you specify. This could be something like parking information, directions to your school or anything that would be pertinent to the entire building.

To upload file, select *Settings* and then *Shared Files* under the navigation section on the



To upload a file click the *Browse* button. This will open the file system in your computer where you can choose the file to upload.

Files must be in .doc, .docx, .pdf, .xls, .xlsx, .ppt, or .pptx format and no larger than 256kb.

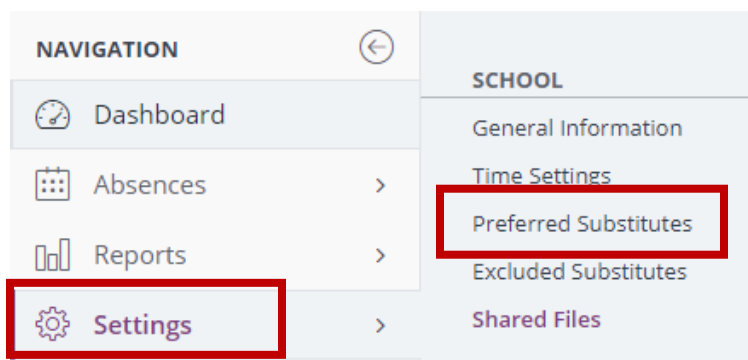


Once you have uploaded the file you will see it in the file list. Here you can give it a description and activate the To and From dates. The *To* and *From* dates will control when the files will be visible to the substitute that takes your absence.

You can add additional documents from the same screen. Once all of the information has been entered, click the *Save Changes* button.

Preferred Substitutes

As a Campus User, you will have the ability to set a preferred list of substitutes for your school. This will allow you to give certain substitutes and advantage when looking for jobs at your location. To set up the preference list select *Settings* and then *Preferred Substitutes* under the navigation section on the left side of your dashboard.



On the following screen you have a couple settings to consider.

A screenshot of the 'Preferred Substitutes' settings page. At the top, there are four tabs: 'General Information', 'Time Settings', 'Preferred Substitutes', and 'Excluded Substitutes'. The 'Preferred Substitutes' tab is selected and highlighted. Below the tabs, the page title 'Preferred Substitutes' is displayed. Under the 'DEFAULTS' section, there are two main areas. On the left, 'Calling Sequence' has two radio button options: 'Use Call Order' and 'Use Random Order', with 'Use Random Order' being selected. On the right, 'Job Visibility' includes a text input field for '% Lead Time' containing the value '95', a 'Visibility Calculator' button, and two time selection fields. The first field is labeled 'Min:' and shows '12' for hours and '0' for minutes. The second field is labeled 'Max:' and shows '120' for days and '0' for hours.

Calling Sequence – Here you can determine if AESOP will call substitutes on the preference list in a specific call order or in random order. In almost all cases, you will leave this set to *Use Random Order* to give the substitutes an equal opportunity to accept the jobs.

Job Visibility – When in ‘percent visibility’ mode, the user is able to define a percentage of the lead time that the job will be visible to the substitute.

Please note: both of these settings have been predetermined by the school division and should be left as they are unless otherwise approved.

Adding a Substitute to the Preferred List

Click *Add New Substitute* to begin creating your school's list to add to an existing list.

The screenshot shows the 'Preferred Substitutes' form. It has a light blue header with the title 'Preferred Substitutes'. Below the header, there are two main sections: 'DEFAULTS' and 'Job Visibility'. The 'DEFAULTS' section has two radio buttons: 'Use Call Order' and 'Use Random Order', with 'Use Random Order' selected. The 'Job Visibility' section has a '95' in a box next to '% Lead Time', a 'Visibility Calculator' button, and two rows of input fields for 'Min' and 'Max' values in hours and minutes. At the bottom right, there is a green button with a plus icon and the text '+ Add Substitute(s)'.

Begin by searching for the substitute in the search bar. Once the substitute appears in the middle of the screen, click the box next to their name and then click the *Add to Preferred Substitutes* button.

The screenshot shows the search results for 'Russell'. The search bar at the top contains 'Russell' and is highlighted with a red box. To the right of the search bar is a 'Back to Preferred Substitutes' button and a green button with a checkmark and the text 'Add to Preferred Substitutes', also highlighted with a red box. Below the search bar, there is a 'Search by Letter' section with a grid of letters from A to O. To the right of the letters is a table with the header 'Substitute Name' and a sub-header 'R'. The table lists two substitutes: 'Russell, Kambra' and 'RUSSELL, KARI', both with '(No Rating)' next to them. Each name has a small checkbox to its left, and the checkboxes are highlighted with a red box. To the right of the table is a section titled 'SELECTED SUBSTITUTES' which contains the text 'Currently, there are no Substitutes selected'.

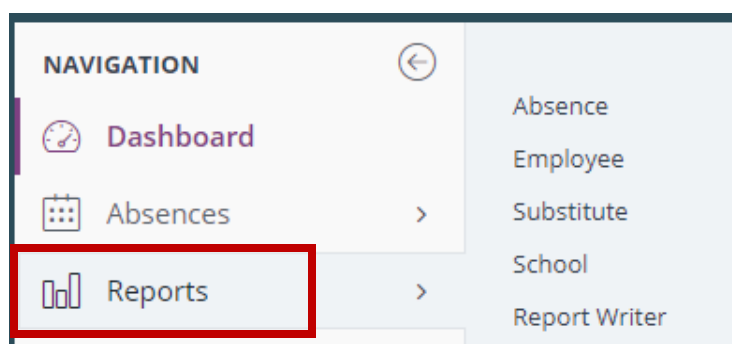
Continue this process until all the substitutes that you would like to be added are included in your school's list.

To remove a substitute from your preferred list, locate their name, click the box next to their name and then click *Remove Selected Substitute*.

The screenshot shows a red button with a trash can icon and the text 'Remove Selected Substitute(s)'.

Reports

There are a number of reports that you will have access to from your AESOP home page. You can find these reports listed under the Navigation section on the left side of your home page.

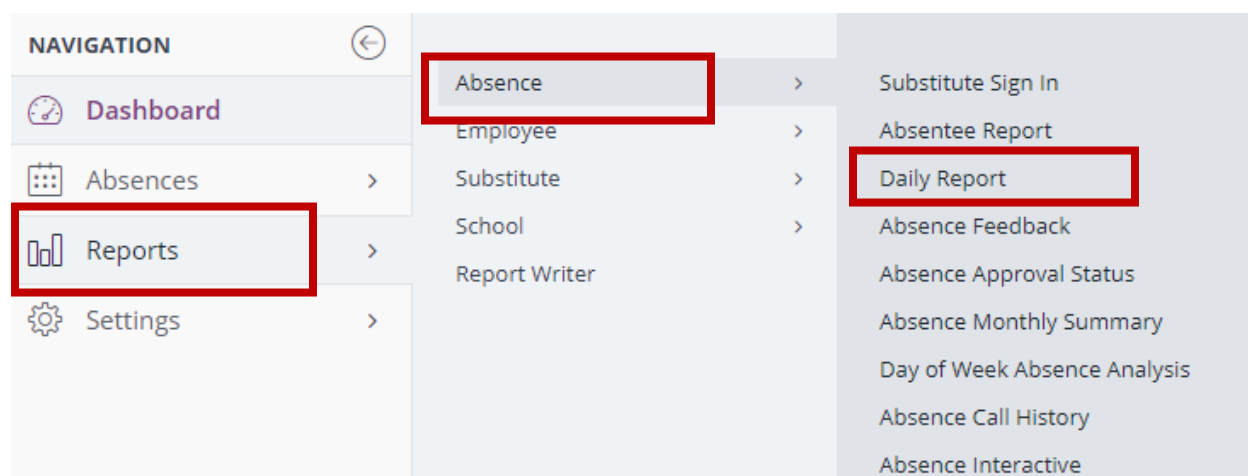


We will begin to look at some of the more commonly used reports.

Daily Report

This is the most widely used report within AESOP. The *Daily Report* lists all the absence information for a specific day's absences. The report lists filled, unfilled and sub not needed absences. It has a number of filters to choose from at the top of the page.

From the Navigation section, click *Reports>Absence>Daily Report*



Please note: this report has been set up to be automatically emailed each morning. If you would like to run it separately or at a different time, these steps will explain the process.

ABSENCE REPORTS Select a Report Change...

Daily Report: Tuesday, November 14, 2017

Date: < Today >
☒ Absences ☒ Vacancies
 View: ☰ ☐☐☐ ?

Walter Elementary School Schools ▾
 All Employee Types Employee Types ▾
 Group By Employee Type ▾

Date: you can enter a specific date in this field. Hit *Search* to update the report

Today: use the left or right arrows to automatically change the view of the absence report below

Absences/Vacancies: you can select or deselect these options depending on the report you are looking to view. Hit *Search* to update the report

View: you can view the report on your screen in a list that will include all your search data or in a view that will put the data in tabs

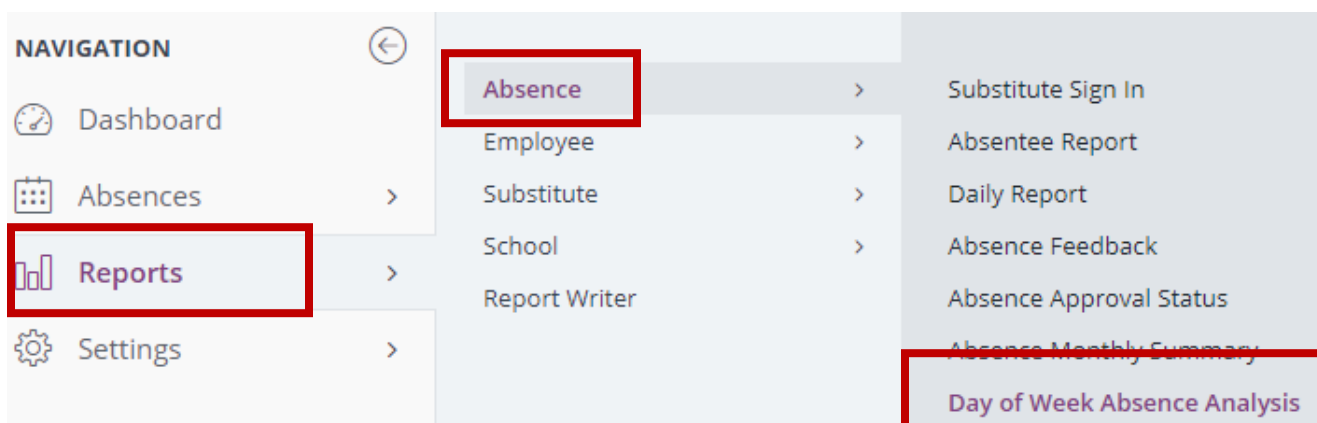
All Employee Types: you can select the type of employee you would like to view. You can search just for teachers or multiple job types like instructional assistants and office staff

Day of Week Absence Analysis

This report allows you to specify not only the date range you are looking for, but you can also select a number of other categories such as the type of employee, absence reason or choose a specific employee.

This report breaks absences down by day, absence reason and employee. The maximum date range is 92 days.

From the Navigation section, click *Reports>Absence>Day of the Week Absence Analysis*



ABSENCE REPORTS

Select a Report
Change...

Day of Week Absence Analysis

Date Range:
11/14/2017
11/14/2017
☒ Absences
☒ Vacancies
☒ Filled
☒ Unfilled
☒ Sub Not Needed

Walter Elementary School
Schools
All Employees
Employees
All Employee Types
Employee Types

All Substitutes
Substitutes
All Absence Reasons
Absence Reasons
All Vacancy Profiles
Vacancy Profiles

Search
Print

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

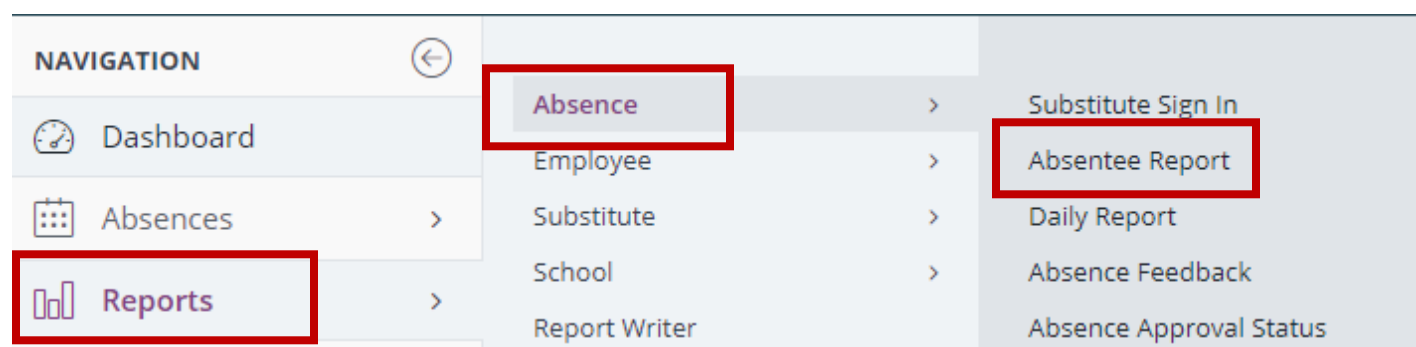
Absentee Report

This report is the same as the daily report, but the difference is that you can enter a date range instead of only searching for one specific date.

If you are running this report for your school, the maximum number of days you can view is 92.

If you are running this report for a specific person, the maximum number of days you can view is 365.

From the Navigation section, click *Reports>Absence>Absentee Report*



Absentee Report

Date Range: 11/14/2017 11/14/2017 ☒ Absences ☒ Vacancies ☒ Filled ☒ Unfilled ☒ Sub Not Needed

Walter Elementary School Schools All Employees Employees All Employee Types Employee Types

All Substitutes Substitutes All Absence Reasons Absence Reasons All Vacancy Profiles Vacancy Profiles

Order By: ☒ Date ☐ Employee ☐ Print with Page Breaks

[Search](#) [Print to PDF](#)

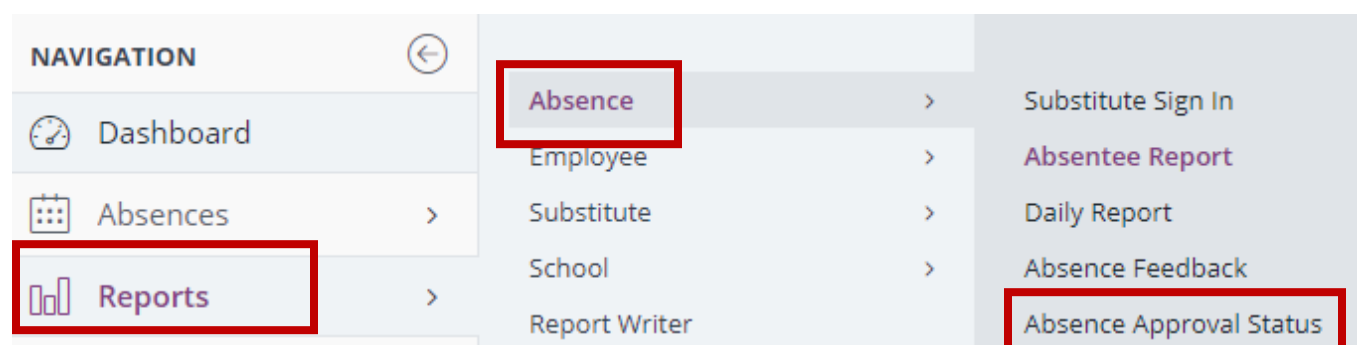
This report allows you to specify not only the date range you are looking for, but you can also select a number of other categories such as the type of employee, absence reason or choose a specific employee.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print to PDF* button.

Absence Approval Status

Use this report to view the approval status of all absences within a date range. The report can be filtered by employee name as well as absence reason.

From the Navigation section, click *Reports>Absence>Absence Approval Status*



ABSENCE REPORTS

Select a Report [Change...](#)

Absence Approval Status

Date Range: 11/14/2017 11/14/2017 ☒ Filled ☒ Unfilled ☒ Sub Not Needed Walter Elementary School Schools ▾

All Employees Employees ▾ All Employee Types Employee Types ▾ All Substitutes Substitutes ▾

All Absence Reasons Absence Reasons ▾ ☒ Unapproved ☒ Approved ☒ Denied ☒ Partially Approved

[Search](#) [Print](#)

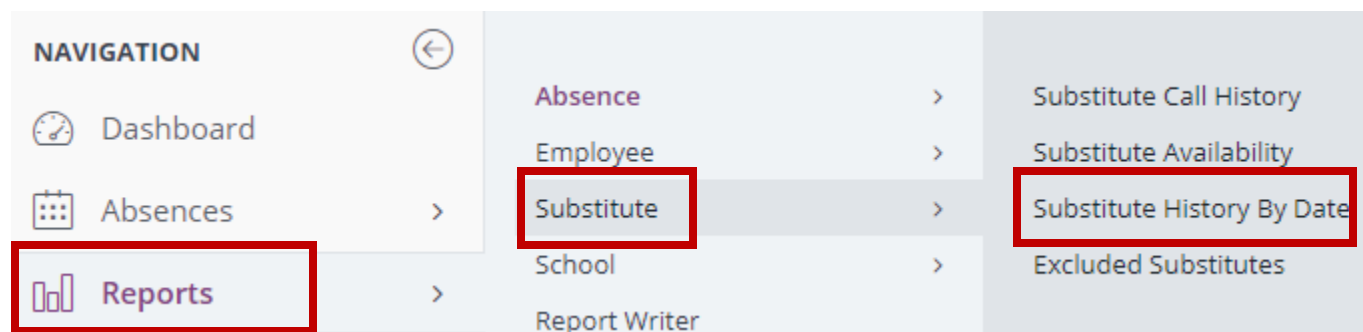
This report allows you to specify not only the date range you are looking for, but you can also select a number of other categories such as the type of employee, absence reason or choose a specific employee.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Substitute History by Date

This report will show you absence history for any substitute who has worked in your building.

From the Navigation section, click *Reports>Substitute>Substitute History By Date*



Substitute History by Date

Date Range: 11/14/2017 11/14/2017 Walter Elementary School Schools All Substitutes Substitutes

☐ Print with Page Breaks

[Search](#) [Print](#)

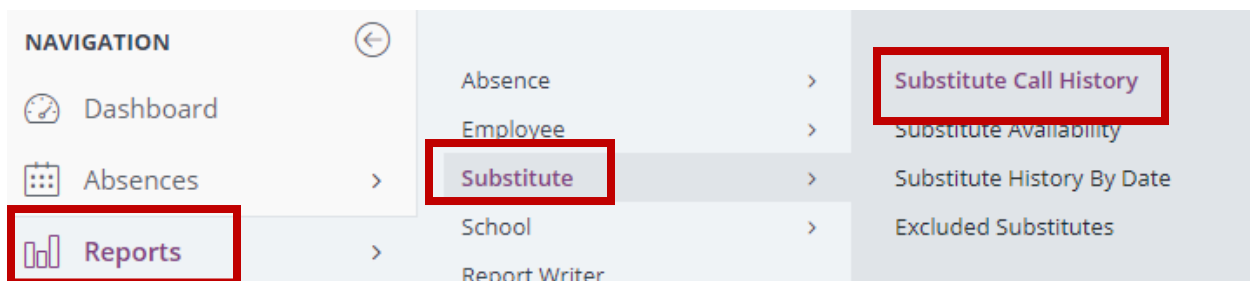
You can select all substitutes within a date range, or select a specific substitute that you would like to view.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Call History Report

View all outbound phone calls from AESOP to substitutes, as well as all inbound calls to AESOP from substitutes. This report also displays the details of those phone calls.

From the Navigation section, click *Reports>Substitute>Substitute Call History*



Substitute Call History

Date Range: 11/13/2017 11/14/2017 All Substitutes Substitutes

[Search](#) [Print](#)

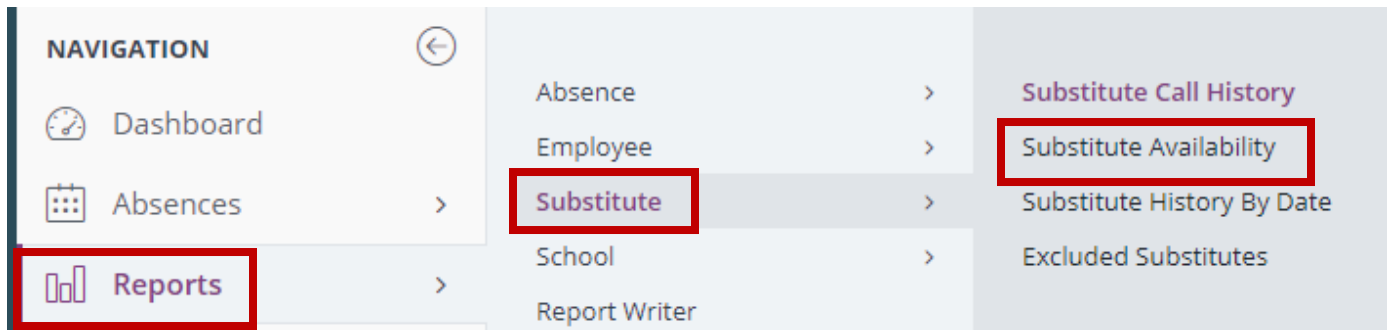
You can select all substitutes within a date range, or select a specific substitute that you would like to view.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Substitute Availability Report

You can review the availability of all substitutes for a specific date. This report also allows you to view all the substitute skills and if they prefer to work at your specific school location.

From the Navigation section, click *Reports>Substitute>Substitute Availability*



Substitute Availability

A screenshot of the 'Substitute Availability' report form. The form has a light blue header with the title 'Substitute Availability'. Below the header, there are several input fields and buttons. The 'Date' field is set to '11/14/2017'. The 'School' field is set to 'Walter Elementary School'. The 'Substitutes' dropdown menu is set to 'All Substitutes'. There is a 'Show Skills' checkbox. Below these fields, there are two buttons: 'Search' and 'Print'.

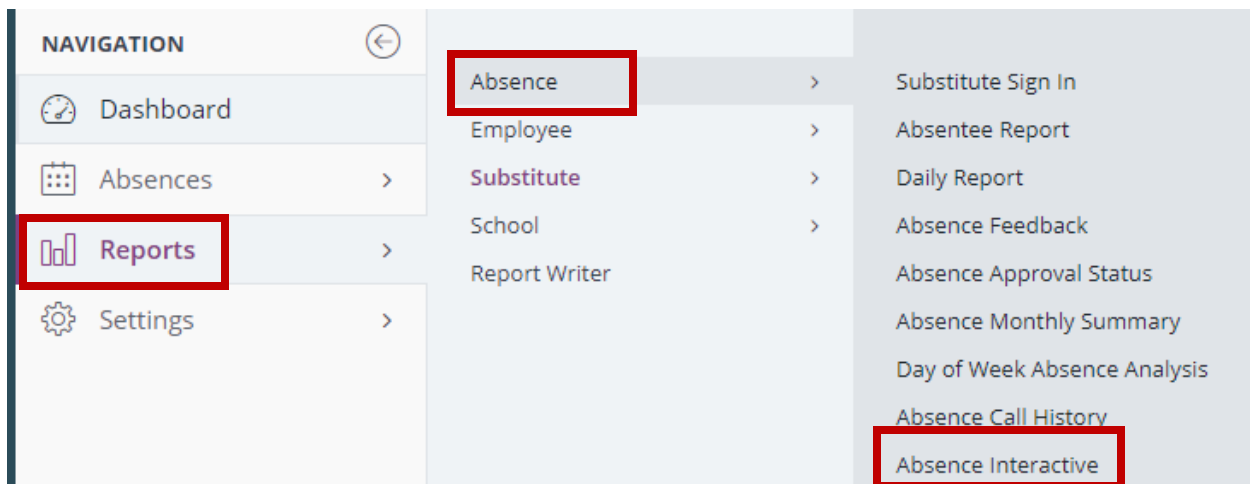
Enter in the specific date you are looking for and then you can search for all substitutes or a specific substitute. If you want to review the skills they have (this determines if they are eligible to substitute for a specific employee) be sure to check the box next to *Show Skill* prior to running.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Absence Interactive Report

This report will allow you to pull information and statistics from AESOP for a large date range. This report also offers a variety of ways that the data can be grouped and gives you the ability to download the detailed information into an Excel spreadsheet.

From the Navigation section, click *Reports>Absence>Absence Interactive*



Absence Interactive

A screenshot of the 'Absence Interactive' report filter interface. It features a series of dropdown menus and checkboxes for filtering data. The 'Date Range' is set to 'This Week' with specific dates '11/12/2017' and '11/18/2017' selected. Checkboxes for 'Absences', 'Vacancies', 'Filled', 'Unfilled', and 'Sub Not Needed' are all checked. Other filters include 'Walter Elementary School' for Schools, 'All Employees' for Employees, 'All Employee Types' for Employee Types, 'All Substitutes' for Substitutes, 'All Absence Reasons' for Absence Reasons, and 'All Vacancy Profiles' for Vacancy Profiles. A 'Group By' section has 'Date' selected from a dropdown, with radio buttons for 'Percent of Day' and 'Count'. At the bottom, there are 'Search' and 'Print' buttons, and a 'Reset Filters' button on the right.

You can select all employees within a date range, select a specific employee, or select an employee type such as teacher. You can also select the absence reason and then choose how you want the date to be grouped together.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

In addition, on the report, you will be able to click from other options to be able to see more data or extract the data. You will see the following options on the right side of your report.

